

MONTANA GOVERNOR'S TASK FORCE ON ENDOWMENTS AND PHILANTHROPY

www.EndowMontana.org

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Five Valleys Foundation, Missoula

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Judy Held
Billings Clinic Foundation

Mark Kelley
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Retired President, University of
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Judy Wing
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U.S. Senator Conrad Burns

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Holly Luck
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MONTANA'S 2007 CHARITABLE AGENDA — RETAIN MONTANA'S CHARITABLE TAX CREDIT!

Montana's Charitable Endowment Tax Credit is due to sunset in 2007. Its renewal by the Montana Legislature is supported by Governor Brian Schweitzer and Lt. Governor John Bohlinger, along with the Task Force and many Montanans, as a critical way to build permanent philanthropic resources for communities, organizations and purposes.

Building A Better Montana Through Increased Philanthropy

Though our economy is improving, still Montanans are concerned about economic security and quality of life. Our governmental agencies and numerous nonprofit organizations still need support to accomplish their goals. We can take charge of our own destiny by encouraging philanthropic giving. With more philanthropic resources, we can:

- Enhance economic development and infrastructure.
- Strengthen Montana's non-profit organizations, charities, and churches.
- Expand educational opportunities through scholarships.
- Build more sustainable communities in rural Montana.
- Enhance services for the elderly, disabled, at-risk youth, homeless, hungry, and others.

How Can We Increase Philanthropic Giving In Montana?

First, we must recognize the critical links between philanthropy and economic development in Montana. Then we must make a commitment to increasing the size of Montana's "philanthropic pie" by:

- Increasing grants from national and regional charities and foundations.
- Educating Montanans about their potential roles in philanthropy, the importance of Montana's charities and the significant tax benefits to charitable giving.
- Involving more Montana businesses, individuals, communities and financial advisors in charitable activities and giving.

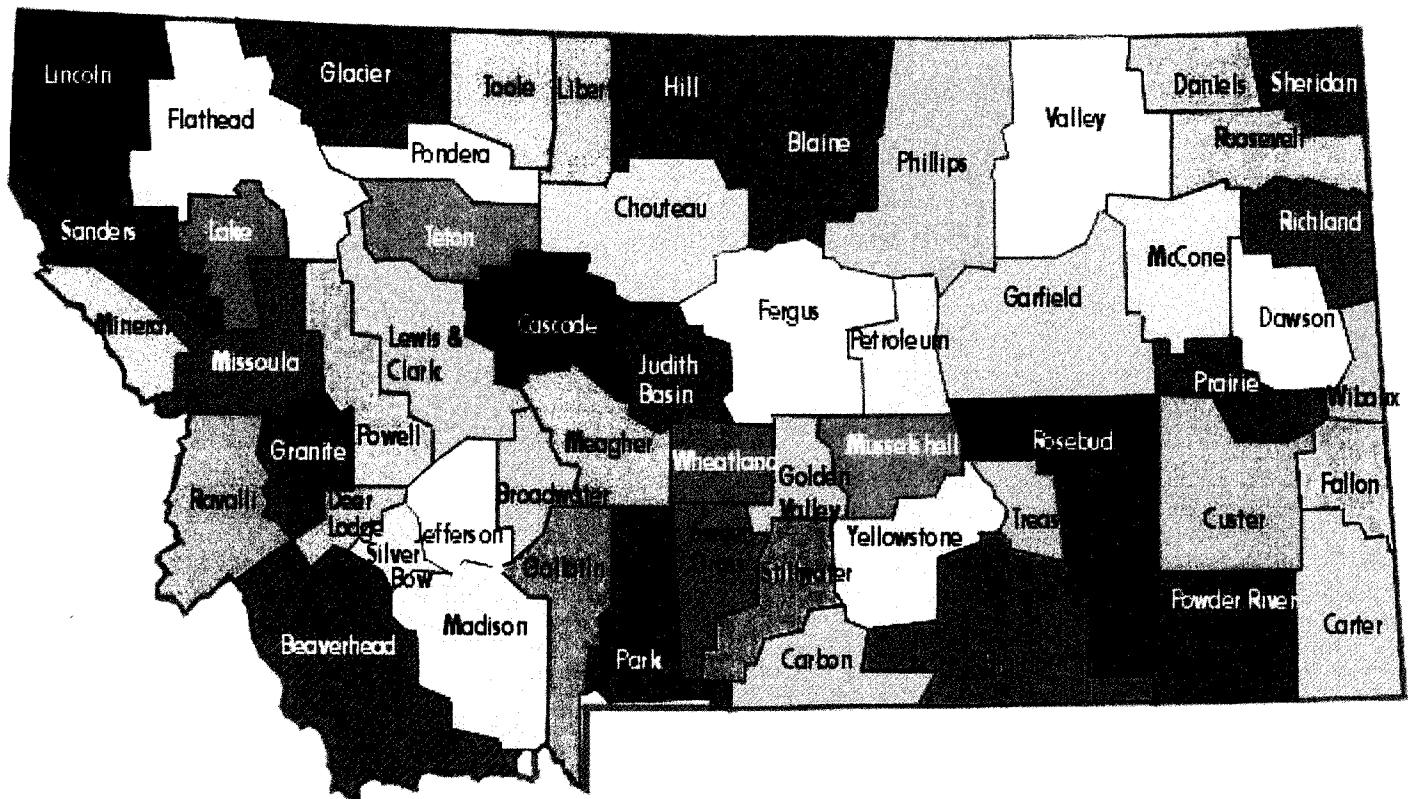
How The Governor's Task Force Has Helped and Can Continue To Help

The Governor's Task Force on Endowments and Philanthropy was established in 1994 with the mission of helping build a better Montana through increased philanthropy. We have helped renew a spirit of giving and sense of community by offering tangible, practical, and achievable ways to enhance philanthropy, including:

- Proposing the nation's broadest state tax credit for gifts to charitable endowments.
- Working with Montana governors and legislatures to retain this historic tax credit.
- Expanding charitable endowment funds in Montana from \$100 to \$200 million, and increasing planned gifts by at least tenfold in ten years.
- Sponsoring dozens of educational sessions for Montana financial advisors.
- Working with the Montana congressional delegation on federal legislation encouraging philanthropy.
- Building financial and social capital by bringing people together to address important issues.

321 East Main Street, Suite 400, Bozeman, MT 59715

Who Benefits from the Montana Endowment Tax Credit?



Visit www.EndowMontana.org/mtmap.html to access an interactive version of this map. You can click on your county to see some of the organizations with endowments that can take advantage of Montana's unique Income Tax Credit for Planned Giving to Endowments. Many of the organizations listed already have benefited. During the first ten years of the tax credit, hundreds (if not thousands) of non-profits located in virtually every county in Montana have received gifts thanks to the tax credit.

Only a portion of the endowments that now exist in Montana are listed here. The Governor's Task Force acquired this information from contacting Montana charities seeking planned gifts. The Task Force is in the process of obtaining information from other charities about the nearly 300 gifts not yet displayed on this map.

What is the Governor's Task Force on Endowments and Philanthropy?

The Governor's Task Force on Endowments and Philanthropy operates with a simple mission of working together to promote charitable giving in Montana. The Task Force is a non-partisan group comprised of representatives of charitable organizations, financial advisors, policymakers, philanthropists, and others who volunteer their time and energy in support of philanthropy. Since its inception in 1994, the task Force has developed and advocated for innovative public policy at both the state and national levels to encourage philanthropic giving.

Although its members are appointed by the Governor, the Task Force receives no state funding. Rather, for nearly a decade the Task Force has carried out its vigorous philanthropic agenda in conjunction with ongoing fundraising and development efforts. To ensure that the costs of Task Force operations, research, lobbying and advocacy, and educational efforts can be fully funded, its own members have worked successfully to generate dollars from foundations, corporations, and individuals.

Visit www.EndowMontana.org for more information about the Endowment Tax Credit, planned giving, and the Governor's Task Force on Endowments and Philanthropy.

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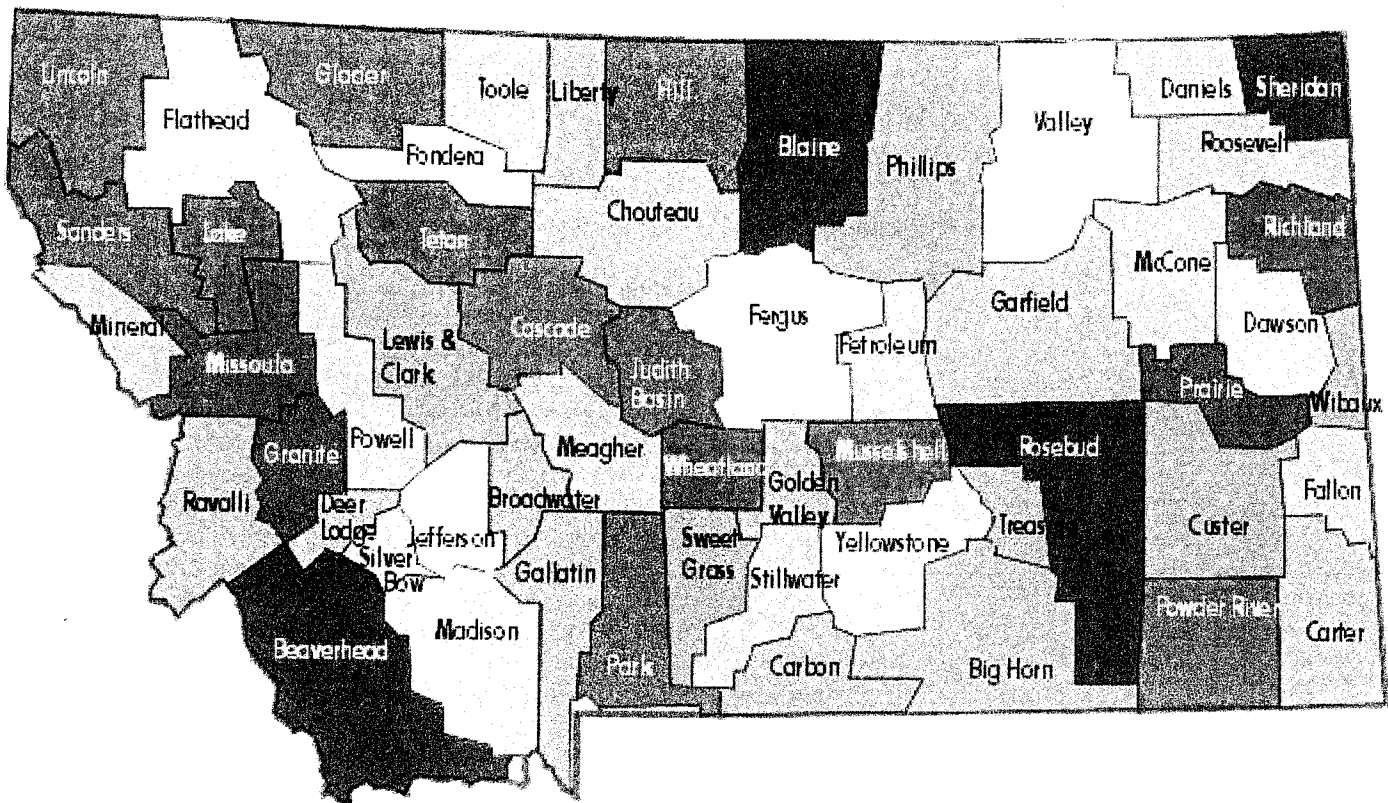
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